e-Elections/e-Surveys User guide

Last Updated: March 12, 2014

McGill

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Overview

The e-Elections/e-Surveys tool is available to all McGill Faculties and Units who wish to create an election ballot or a survey online.

Terminology:

Consultation: is the term used to refer to an e-election or an e-survey.

Author: is the person who creates an e-election or an e-survey. Only the author can identify other people to participate in the management of his consultation i.e. edit the content and view the results.

AD: the directory service for Windows which allows to use your McGill Username and password as you login for most McGill systems and helps to create and manage groups, resource accounts, computers, printers and much more.

Before you start

You will need:
- The Surveys and Elections management role. To request it, contact ICS at 514 398-3398 or at itsupport@mcgill.ca
- To identify the people eligible to participate in the election/survey.
    - Prepare the list of people and request an AD group:
        1. Ask an HR representative in your department/faculty to prepare the list of McGill usernames (firstname.lastname@mcgill.ca). See how to find McGill Usernames at the end of this document.
        2. Request an AD group and an AD group name to ICS (itsupport@mcgill.ca). See the AD group name standards.
    - If you cannot find McGill usernames, prepare the list of people with their McGill IDs and send it to HR (Nancy Wong). Provide the dates of the e-election and the name of people administering it. HR will request a new AD group to ICS.
    - McGill usernames may be entered manually in the e-election parameters.
- To determine the content of the e-election or e-survey: instructions, the choice of candidates and if you wish, their profile, their pictures, CVs or statements, questions to ask.

> **Tip**
>
> If you are planning to have the e-election or e-survey tested by people who do not have access to the consultation as managers, it is recommended to create a test consultation for the testers, and when ready, duplicate it and make the duplicate go live. See Test a consultation.

Access to McGill e-Elections and e-Surveys

URL: https://mcgill.onmivox.ca

Login: McGill Username and Password

Create an e-election

Process

1. Set up the parameters of the new e-election: title, dates and duration, participant population and the addition of personnel authorized to participate in the management of the consultation.

2. Add the content of the e-election: titles, text and the choice of candidates.

Procedure

Set up the parameters of the e-election

1. On the initial screen, click **Surveys and Elections Management.**

2. Click **Create a new Election**

Surveys and Elections Management

Instructions

To consult or export the **results** of a consultation, click on the [icon] icon located on its right.

To consult or modify the **parameters** of an existing consultation, click on its title.

To **create** a new consultation, two choices are offered to you:
- to **build a consultation from scratch**, select one of the links hereunder
- to **build a consultation based on an existing one**, click on the consultation to duplicate and then choose the *Create a new consultation based on this one* option. This will copy the existing consultation content and parameters into the new consultation so you can then modify them at will.

➕ **Create a new *Survey***
➕ **Create a new *Election***
➕ Create a new consultation *Teaching evaluation*
➕ Create a new consultation *General Public Survey*
  no login required and matching your website's design

Display filters

☐ Do not display older consultations (completed over a month ago)

No	Title	Status	Receipt of answers	Nb Participants	Consultation Type	Results

The **New Election** window appears

3. Fill in the **General information** section with the exception of the **Mode** and the **Demographics of participants.** Those two items do not apply to the McGill set up.

a) Enter the **Title**: it will appear on the e-election

b) Enter the **Start Date**: do not enter the real date. Enter a date in a far future and when you are ready to go live, you will be able to edit the consultation and enter the proper date (see Edit a consultation). Once the consultation is started, the date cannot be changed anymore.

c) Enter the **End of consultation** date. It is the date and time at which the election will end. It must be at a later date than the start date. The end date can always be changed even if the consultation has started.

d) Check off **I cancel my vote** if you want to give the opportunity to voters to cancel their vote.

4. Specify the participants of the election.

a) To specify an AD group, go to the **Filters** section:

1. Click **+ Add a group from the University's directory**. The groups list appears.
2. Click a group on the left side to select it.
3. Click **Save**

Filters

By Users' Type	
	☐ Students
	☐ Teachers
	☐ Non-teaching employees
	☐ Hourly paid instructors

These users' type will be able to participate in the consultation.

If you would like for only certain students to have access to this consultation, you must enter the list of students targeted in section «List of participants to this consultation, regardless of previous filters». You MUST NOT check the «Students» box above.

Faculty

List of faculties in which students must be registered or to which employees must belong in order to participate in the consultation. If no faculty is entered, no filter will be applied. The list of faculties must be separated using semi-colons. If you want to apply a filter on an interval of faculties, separate these using a hyphen.(ex:0200-0250;1000;METO)

...ers and/or
...oyees by Service or
...tment

Enter the list of departments that employees must belong to in order to participate in the consultation. If left blank, no filter on the department will be applied. The list of departments must be separated using semi-colons. If you wish to enter an interval of departments on which to filter, separate these using a hyphen. (ex: 0200-0250;1000;METO)

...nts by Study
...ams

Enter the study programs that a student must belong to in order to take part in this consultation. If no study program is entered, no filter will be applied on the program. (ex: 0200-0250;1000;METO) The list of programs must be separated with semi-colons. If you wish to apply a filter on an interval of programs, please separate them with a dash.

...duals by groups in the
...ory → **+ Add a group from the University's directory**

Enter the list of groups in the University's directory that you want to allow to participate in the The list of groups must be separated by semi-colons. (e.g. group1;group2) poll.

...nt's academic cycle
...program
- ⦿ Do not filter on the academic cycle
- ◯ Filter on the numbers corresponding to the academic cycles
  [▾] to [▾]

- ⦿ Do not filter based on age
- ◯ Only accept persons aged between
  [▾] and [▾] years.

Gender
- ⦿ Do not filter on gender
- ◯ Accept only persons of the following gender

Select a group of individuals

This tool is used to select the groups that have the right to participates in the consultation. The list on the left shows all the available groups. It is possible to limit the number of groups by entering a key word in the filter box. The star (*) character may be used as a wildcard. The members of the groups in the list on the right will be invited to answer to the consultation.

Filter groups
Enter a keyword to limit groups displayed

Availables groups

114-Elections_Sociology_2013-05
006-Elections_Acad
006-Elections_fac_education_elig_acads
006-Elections_Senate
006-Elections_Education_elig_acads
006-Authorized to Email Elections
021-Elections_Arts_Senate
006-Elections_April_Grp1
006-Elections_April_Grp3
094-Elections_Anthropology_Chair
006-Elections_Pilot
914-Elections_MAUT_2013-04
107-Elections_History_Chair
356-Survey_Proc_Serv
032-Elections_Science_Senate_2013-05
006-Elections_SCS_Acad
025-Elections_Engineering_01065666
006-Elections_Test_For_Norm
112-Elections_Political_Science_Chair

Group(s) selected
Members from this group may answer this consultation.

914-Elections_MAUT_2013-04

[Save] [Cancel]

Note

The groups in the list are AD groups. To add a new group in the list of groups, send a list of people with their McGill IDs to HR (Nancy Wong). HR will send the list of McGill Usernames to ICS who will create a new AD group.

b) To add eligible voters who are not part of an AD group, go to **the List of participants to this consultation, regardless of previous filters.**

- Enter the McGill Usernames in the **List of employees.**

📢 **Tip**

If you are not ready to select an AD group but want to save the e-election as an initial draft, simply enter your McGill Username in the **List of employees**. Once you are ready to select a group, remove your username from the list.

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5. If needed, give individuals the permission to manage the e-election. They will be able to edit the election and view the results.

Go to **Accessibility restrictions to this consultation's management.** This section shows the list of people having access as Surveys and Elections managers.

To give individuals the permission to manage the e-election, check off their McGill Username.

Note

Once a consultation has begun, no one can modify the content.

6. Click **Add**. The following screen appears.

Add the content of the e-election

There is a choice of 4 elements to add to the content:

- A **title:** it is not required since the overall title of the election was defined in the first step of the election creation. However multiple titles may be added, for example if the ballot has multiple parts. Click **Add a title** every time you want to add a new title.
- **Instructions**: any text that you want to add to the content. Multiple paragraphs may be added on different parts of the content. Click **Add instructions** every time you want to add new text.
- The **choice of candidates**: the list of candidates with a photo if desired and a web link to their statements. You can add multiple lists of candidates. For example, add a choice of candidates for the election of the president and add another choice of candidates for the election of committee members. Click **Add a choice of candidates** to add a new choice of candidates.
- A **page brake:** at least one page break is required. Click **Add a page break** every time you want to add a new page break.

> **Tip**
> You can use HTML tags to format text such as changing color, making text bold, changing the font size or adding a hyperlink. To learn more about HTML tags, see the Appendix - HTML code.

See an example of e-election content on the next page.

McGill

Consultation in
anonymous mode

This election ballot has two parts, one for the election of the president of our association and the second for two members of the Council.

Election of the president

There are three candidates to the presidency:

Melissa Nguyen

Melissa currently teaches upper year courses in civil engineering. She has been at Mcgill 15 years. She is a member of the Canadian Association of University teachers.

Robert Young

Robert has joined the association in 1995 and became in 2001 a member of the Tenure and Mentoring Committee. He was elected V.P. internal in 2009.

Thierry Singer

Thierry is presently the chair of the remuneration Committee. He has been an academic advisor for 10 years.

1. **Please vote for your favorite candidate**

   ○ Melissa Nguyen
   Consult the candidate's statement

   ○ Robert Young
   Consult the candidate's statement

   ○ Thierry Singer
   Consult the candidate's statement

| 1 | 2 | 3 | ▶ Next |

Add a new title

1. Click **Add a Title**

2. Enter the title in the **Text** box.
3. In the **Insert position** dropdown list, select where you want the title to be added in the content.
4. Click **Add**.

Add new text

1. Click **Add instructions.**

2. Enter the text in the **Text** box.
3. In the **Insert position** dropdown list, select where you want the text to be added in the content.
4. Click **Add**.

Add a new choice of candidates

1. Click **Add a choice of candidates.**

2. It is required to add text in the **Text** box.
3. In the **Insert position** dropdown list, select where you want to add the choice of candidates in the content.

4. Select the **Number of candidates to be chosen**. Either
    a. Only one candidate.
    b. Multiple candidates. Select the number of candidates. For example, if 2 candidates must be chosen, select: **The participant must choose between '2' and '2' candidates**.
    c. Multiple candidates in preferential order. For example, if 3 candidates must be chosen, select: **The participant must place between 3 and 3 candidates in preferential order**.
5. Add the candidates: click **Add a candidate**

    a. Enter the candidate's name in the **Text** box.
    b. If you wish, click **Add the photo** to show the candidate's picture. The following window will pop-up. Click **Browse** to find the picture on your computer and upload it.

    c. If the candidate has a statement on a web site, enter the URL in the box where it says: **Hyperlink to the candidate's Curriculum Vitae**. In the voter's view, it will show the link "Consult the candidate's statement".
6. To add more candidates, click **Add a candidate** and repeat steps a) to c) above.
7. Click **Add.**

Add a new page break

1. Click **Add a page break.** It is required to add a least one page brake.
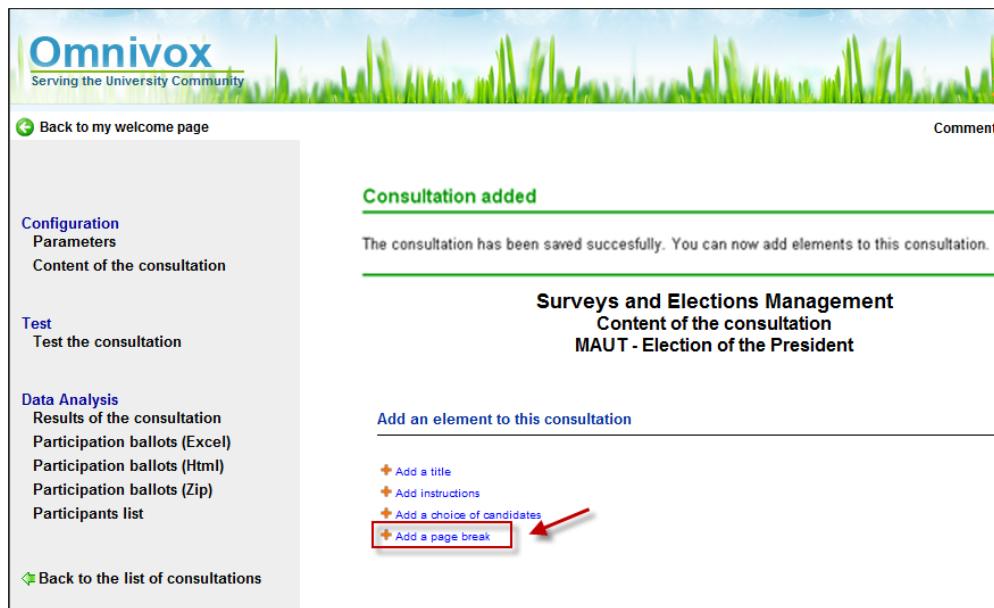
The following screen appears:

1. Default text appears in the **Text** box. There is no need to change it since it does not show on the voter's view.
2. In the **Insert position** dropdown list, select where you want to add the choice of candidates in the content.
3. Click **Add.**

Preview a consultation

- Once the elements are added to an election or a survey, they are listed on the **Content of the consultation** page.

  To preview a specific element, click the **Preview** icon.

Surveys and Elections Management
Content of the consultation
MAUT - Election 2013

Add an element to this consultation

➕ Add a title
➕ Add instructions
➕ Add a choice of candidates
➕ Add a page break

Add a choice of candidates based on the following choice of candidates:
1. <big>Please vote for your favorite... ▾   Add

Move an element to a new position:
Element to move: Instructions - This election ballot has two parts, one for the election of the... ▾
New position: at the beginning of the consultation ▾   Move

List of elements in the consultation

Position	Type	Content	Preview	Delete
△ ▽	!	Instruction This election ballot has two parts, one for the election of the president of our...	🖥	🗑
▲ ▼	T	Title Election of the president	🖥	🗑
▲ ▼	!	Instruction There are three candidates to the presidency: <strong><big>Melissa...	🖥	🗑
▲ ▼	?	Candidate choice 1 <font color="red"><big>Please vote for your favorite...	🖥	🗑
▲ ▼	↵	Page break Page break		🗑
▲ ▼	T	Title Second part	🖥	🗑
▲ ▼	?	Candidate choice 2 Please vote for two Committee members	🖥	🗑
▲ ▼	↵	Page break Page break		🗑
▲ ▽	!	Instruction Thank you for your participation	🖥	🗑

Legend

T Title
! Instruction
? Choice of candidates
↵ Page break

- To simulate an election or a survey, click **Test the consultation** on the sidebar.

Edit a consultation

Access an existing consultation and edit its parameters

On the **Surveys and Elections Management** screen, you will find your list of consultations. Click the consultation's title to access it.

The consultation's parameters appear.

You can change the parameters. The **Start date** cannot be changed if the consultation has started. The **End date** can be changed any time.

Click the **Save** button at the bottom of the screen.

Edit the Content of a consultation

1. Access the consultation (see Access an existing consultation on the previous page)
2. Click **Content of the consultation** on the sidebar.

You will be presented with the list of elements in the consultation. You can:

- Add an a new element or edit an existing element
- Move an element to another position in the content
- Preview and element
- Delete an element
- Add a new choice of candidates by duplicating an existing one

Test a consultation

If you want the consultation to be tested by people who do not have **Surveys and Elections management** rights, it is recommended to:

Create a test consultation

    a. Create the consultation (see Create an e-election or Create an e-survey) for an agreed date and time for the testers. (Note that the end date and time can always be changed). Do not add a group in the McGill directory (AD group) in the Filter section of the Parameters.

    b. Enter the McGill Usernames of the testers in the **List of Employees**.

    c. Add the content.

    d. Ask the testers to test the consultation.

    e. Modify the consultation based on the testing results.

Duplicate a test consultation

When the final version is ready:

    a. Access the test consultation (see Access an existing consultation).

    b. Click **Create a new consultation based on this one (duplicate this consultation).**

    c. Modify the title if needed.

    d. Enter the proper dates and times.

    e. Select the AD group in the **Filter** section (see **Specify the participants of the e-election**).

    f. Remove the testers' McGill Usernames form the **List of Employees.**

    g. Click **Save** at the bottom of the screen.

Create an e-survey

Process

1. Set up the parameters of the new e-survey: title, dates and duration, participant population and the addition of personnel authorized to participate in the management of the consultation.

2. Add the content of the e-survey.

Procedure

Set up the parameters of the e-survey

1. Access the **Surveys and Elections Management** screen.
2. Click **Create a new Survey.**

3. Fill in the **General information** section with the exception of the **Mode** and the **Demographics of participants.** Those two items do not apply to the McGill set up.

a) Enter the title in the **Title** box.
b) Select a **Start Date**: do not enter the real date. Enter a date in a far future and when you are ready to make the survey available, enter the proper date.
c) Specify when the consultation will end. It can be either:

- A date:
  check off **at the following date** and enter the date.

- After a specific number of participations is reached:
  check off **when x participations will have been received** and select a number in the dropdown list.

- When one of the two conditions above is met.
  check off both conditions and select a date and the number of participations.

d) If you want the survey to be anonymous, check off **Gather ballots on anonymous basis.** You will not have access to participants' identities. A user will not be able to participate more than once.

e) To allow the end user to save the results after each page instead of the end of the survey, check off **Save the results after each page change**.

f) If you wish, enter an email address to receive a message with the content of the participations.

4. Specify the participants of the survey. Do the same as for an e-election <u>on page 7 and 8</u> of this document.

5. If needed, give individuals the permission to manage the e-election. They will be able to edit the election and view the results.
Go to **Accessibility restrictions to this consultation's management.** This section shows the list of people having access as Surveys and Elections managers. Check off their McGill Usernames to give individuals the permission to manage the e-election.

6. Click **Add.** The **Content of the consultation** screen will appear.

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Create an e-survey
Page 24 of 33

Add the content of the e-survey

The list of elements that you can add to your survey shows on that page. Click **+ Add *element name*** to add a new element.

Title: add a title that is not the same as the global title added to the parameters. If your survey has many sections, you can add, for example, a title at the beginning of each section of the survey.

Instructions: any text that you want to add to the survey.

Questions: the types of questions that you can add are:

- With one or multiple answers
- With answers to place in order of preference
- With scaled answers
- With no proposed answers
- With a numerical answer

Page break: add a page break if you want to add another page to the survey.

View an example of a survey on the next page.

Survey about the food services at McGill
Page 1/2

Global title

Personal information

Title

This section is not required.

Instructions

1. Your department

   ○ ICS
   ○ NCS
   ○ CCS
   ○ Other [_____]

One or multiple answers question

2. How many times a month do you eat in one the McGill food services?

   [_____]

Question with no proposed answer

Quality of food

Title

3. Order of preference

   [▼] Faculty club

   [▼] Engineering café

   [▼] Burnside café

   [▼] Awocato café

   [▼] Thompson house

Question with answers to place in order of preference

Comment

[_____]

| 1 | 2 |

Page break

▶ Next

Add a title and instructions (text): same as for the e-election (see pages 12-13 of this document).

Add questions: click on add a question with…. for the type of question that you wish to add.

- Select the desired options, add the elements of the question and click **Add**.
- Here is an example below of the **question with one or multiple choice answers**

Enter your question

Select the position of the question in the survey

Select the number of possible answers

Is it a mandatory question?

Allow the end user to enter comments

You will see the **Jump to an item** option only if other questions are following. It is used to hide items in the questionnaire.

Click **Add a choice of answers** for every choice that you want to add

Save the question

The list of elements of the survey appears on the **Content of the Consultation** page.

Preview: see how to preview and test the consultation in this document on page 17-18 and how to edit the consultation on page 18-20

View the results of a consultation

- Results of the consultation
  - You must wait after the end of the consultation to view the results. Only the author of the consultation and the people who were given the authorization by the author (see page 9 of this document) can view the results.
- The list of participants
  - For an election, the list is available before the consultation's end.
  - For a survey, the list of participants is not available if the anonymous option was selected for that survey.

To view the results or the list of participants:

1. Access the consultation
2. Click one of the items in the **Data Analysis** section of the sidebar.

Participants list: opens an Excel spreadsheet listing the people who submitted their answers.

Results of the Consultation: view of the total number of answers for each choice. The answers to a question with no proposed answer are available only by accessing the **Participation ballots**.

Paticipation ballots: view the details of each participation ballot in the format of your choice:

- An Excel spreadsheet.
- An HTML file. The participation ballots open in a new window in your internet browser.
- A zip file. You need to save the file on your computer and extract the files. There is a file for each participation ballot. For example, if 200 people participated in the survey, you will get 200 files when you extract the zip file.

Appendix

HTML codes

- HTML codes, also referred to as HTML tags, are keywords surrounded by angle brackets e.g. <body>.
- Generally tags come in pairs like: text

     is the opening tag

     is the closing tag

- The closing tag is the same as the opening tag but with a forward slash before the tag name.
- There is always a tag before and after the text that you want to modify.

    <p>paragraph</p>

- Different tags do different things, for example:

    <big> text </big> for a larger font sized text.
     text to write in bold.

- You can also combine tags. Put your text between the tags like this to obtain the desired result:

    <big> **I want this text to be larger and bold**</big>

- Some tags do not need to be in pairs. Here are two examples:
    Line break:
 It inserts a new line.
    Horizontal line: <hr /> It inserts a horizontal line.

See examples of HTML tags and the result on the next page.

HTML code	Result
<h1>This is a heading 1</h1>	**This is a heading 1**
<h2>This is a heading 2</h2>	**This is a heading 2**
<h3>This is a heading 3</h3>	**This is a heading 3**
bold 	**bold**
 RED	RED
Bigger green	Bigger green
<u>underlined</u>	underlined
small blue 	small blue
<p align="center"> center text </p>	center text
<big>BIG</big>	BIG
<small>small</small>	small
<u>This is a link</u>	This is a link (Link to the McGill home page)

Look for McGill Usernames

Anyone who has access to the HR datawarehouse can retrieve McGill usernames in Minerva as follows:

1. Sign in to [Minerva](#).
2. Click on the **Reports** Tab.
3. Click on **HR Data Warehouse Query.**
4. In **Orgn***, select and organization or select all by clicking on ***** All the Orgn on this list *****
5. In **Group Data***, click on **Personal Information Columns**.
6. Scroll down towards the bottom and click **Submit**.
7. You can download this report to Excel. There is a download icon at both the top and the bottom of the report. When the small popup screen comes up, choose to **SAVE** the file to your computer as the **OPEN** command takes a long time to run.
8. **McGill Username** is at the far right of the file. You can delete all of the columns except for **McGill Username**.

AD group name standards

The AD group names have the following structure: **aaa-bbbbbbb_ccccccccc_yyyy-mm**

```
E.g. 095-Election_Art_History_2013-05
     101-Election_Economics_2013-05
```

aaa	Organizational code of the unit (or on behalf of which) is conducting the election or survey e.g. 101 = Economics
bbbbbbb	Type of consultation: **Election** or **Survey**
ccccccc	Description of the consultation. E.g. "Sociology" or "Sociology_Chair".
YYYY-mm	The year and month around which the election or survey is expected to be conducted. It does not matter if the consultation crosses 2 calendar months or if the consultation is delayed.